



Town of Whitestown

Human Resource Audit

August 7, 2019

Town of Whitestown
Attn: Jason Lawson

Jason:

Thank you for the opportunity to assist Town of Whitestown with its Human Resource needs; specifically conducting an audit of its current human resources policies, processes, and practices. This proposal summarizes your needs, Tilson's recommended approach to address those needs, deliverables, project plan timeline, and fee estimates to provide you with human resource solutions to help facilitate your company's growth and success.

Town of Whitestown's Needs

Town of Whitestown recognizes the need for a strong HR platform to be in place to attract and retain the best team possible. After speaking with you, there may be some HR functions that are not being covered which opens up several areas of concern regarding compliance and the long-term potential risks that are being placed on Town of Whitestown. Finding a long-term solution for the current systems and implementing a game plan that is realistic for the success of the company will be the key moving forward. Town of Whitestown has an opportunity to understand what the bar should be, establish where you want to set that bar, and have your team consistently deliver at the highest possible level. After additional discussion, Town of Whitestown realized that the first step would be an assessment of the current structure and practices to determine if payroll, benefits and all other HR processes are being completed timely, accurately and within the legal guidelines, at all times. This will help to determine the best course of action in moving forward.

Tilson's Recommended Approach

The Typical "HR Assessment" is looking at employment practices, policies, and documentation, and interviewing the primary person responsible today for such administration. Tilson will review all internal company documentation, talking with the key people, reviewing personnel files/ benefit files, and Review I-9.

Tilson recommends assessing four (4) main HR Elements at Town of Whitestown: Platform, Programs, People and Protection.

Platform – Tilson will review such things as how Payroll and Benefits are administered. We will review the company's chosen vendors to look at efficiencies and inefficiencies. We will assess the HR Systems to determine how they are integrated. (3-6 Hours estimated)

Programs – Tilson will review the various benefit programs offered to employees. We will review the process for recruiting new staff, training programs offered to keep employee's

skills current, performance management program currently in use and determine what programs do not exist that would be beneficial to Town of Whitestown. (4-8 Hours estimated)

People – Tilson will determine the technical HR knowledge base at Town of Whitestown through interviews and general discussion with staff and management, where appropriate. We will consider the types and levels of exposure the company is under in the current structure. (3-6 Hours estimated)

Protection – Tilson will identify what steps are missing at Town of Whitestown that could provide greater exposure in the areas of hiring, employee handbook, terminating, and tracking and administering FMLA, assigning exemption classifications, job description audit, compensation review, maintaining I-9 compliance, etc. (30-40 Hours estimated)

Following our review, Tilson will consolidate all findings into an Assessment Summary Document to be provided to the Town of Whitestown along with our professional recommendations.

Our Fees

Based on our conversations with you, we understand the need to complete this assessment as quickly as possible without impacting the integrity of our findings. A project of this nature is estimated to require 40-50 hours from start to finish. This project will require Tilson to work on-site at Town of Whitestown while gathering data and interviewing employees, however to avoid disruption in your office we will review and analyze the data from the Tilson Office.

Professional Fees:

We propose to provide our services on a not to exceed contract of \$5,000.00. We will bill our time on an hourly rate of \$100.00 per hour. The above amount includes drive time and mileage for two client visits. Should this be acceptable we will send over our standard contract for your review and signature.

We would anticipate invoicing Town of Whitestown at the end of the project with payment expected within 30 days from the date of the invoice.

Confidentiality Statement

All information contained within this proposal shall be considered confidential and shall only be used by Town of Whitestown for the exclusive purpose of evaluating Tilson as a potential service provider.

Unless previously agreed upon in writing with Tilson, information contained within this proposal shall not be shared for any reason with any party outside Town of Whitestown. If Tilson is not selected to provide the proposed services to the organization, Town of Whitestown agrees to return all previously supplied copies of this proposal document to Tilson within 60 days of the date Tilson is notified by the company of its decision not to engage Tilson for the proposed professional services.

In addition, Town of Whitestown agrees not to solicit any employee of Tilson for a period of one (1) year from the date of this proposal.

Summary

We have summarized our fees and invoice method on the following page in the attached "**Exhibit A: Fee Statement**". If you are in agreement with the approach and fees outlined herein, please sign and date the engagement letter and return one copy to my attention at your earliest convenience.

Thank you for this opportunity to offer our additional services. I look forward to the opportunity to assist Town of Whitestown with addressing your business and human resource needs.

Sincerely,



Chad Collier
Vice President, Sales
Tilson

I hereby accept the terms and conditions of the aforementioned project(s) provided to Town of Whitestown from Tilson.

Month/Day

Year

Signature of Acceptance

Date of Acceptance

Exhibit A

Fee Statement

Client: Town of Whitestown

<u>Key HR Processes</u>	<u>Fee Estimate</u>	<u>Total Hours</u>	<u>Timing</u>
<i>Human Resource Audit:</i>			
<i>Platform</i>	<i>\$450.00</i>	<i>4.5 hours</i>	
<i>Programs</i>	<i>\$600.00</i>	<i>6 hours</i>	
<i>People</i>	<i>\$450.00</i>	<i>4.5 hours</i>	
<i>Protection</i>	<i>\$3,500.00</i>	<i>35 hours</i>	
 Total:	 \$5,000.00		
 <u>Out-of-Pocket Expenses</u>	 <i>Included in estimated fees.</i>		